

Getting started with M-Files
User's Guide

Version: 7

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1. Introduction

M-Files[®] on-premise edition is intended for businesses to help them efficiently organize and manage their important business documents without requiring them to purchase and administer their own server.

The key benefits of using M-Files:

- supports all document types
- automatic version control off all documents
- easy to find documents
- easy to collaborate with documents
- M-Files is seamlessly integrated with Windows Explorer, so if you know Windows, you know M-Files.

M-Files also may be deployed in the cloud using our M-Files Cloud Vault product, as well as vertical implementations. Visit our website for more information on these products.

1.1 Product support

For assistance with M-Files, you reach us at:

USA & Canada

M-Files Inc.

5050 Quorum Drive, Suite 600

Dallas, TX 75254

USA

Phone: (972) 516-4210

Fax: (972) 516-4211

support@m-files.com

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Hatanpään valtatie 26

33100 TAMPERE

FINLAND

Phone: +358 3 3138 7500

Fax: +358 3 3138 7550

support@m-files.com

M-Files Community

www.m-filescommunity.com

2. Getting started

After successful installation of M-Files, a new virtual disk drive is added onto user's Windows system. You can access M-Files through this virtual drive or by double-clicking the desktop shortcut or notification area button.

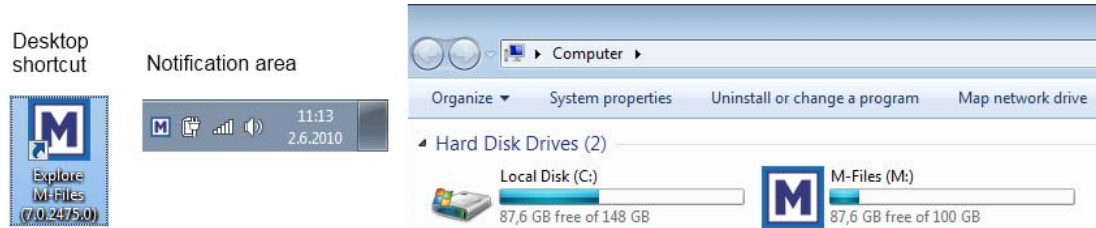


Figure 1 - M-Files can be opened from desktop shortcut, Notification Area or Windows Explorer

To log in, enter the username and password. The credentials are sent to you by e-mail.

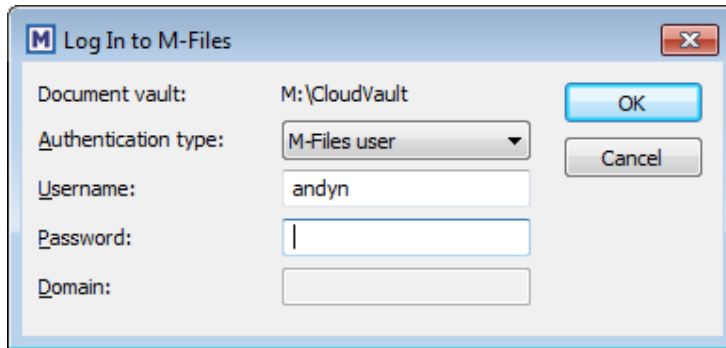
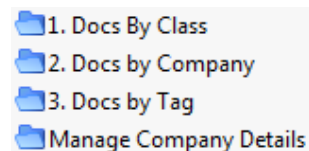


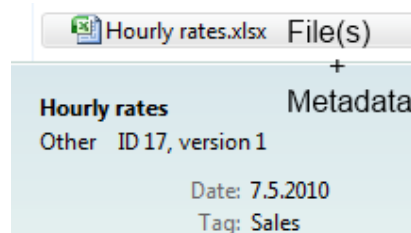
Figure 2 - Log In to M-Files with the username and password

2.1 M-Files terminology

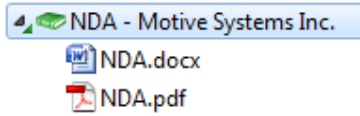
Get acquainted with the following terms to easier follow this getting started guide.



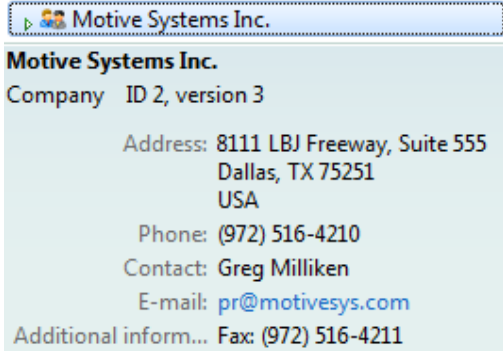
Views are locations in which the documents and other objects are listed based on the metadata they contain.



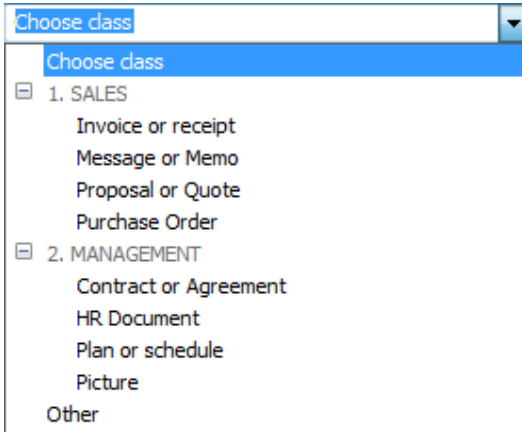
File and document (and their differences): an example of a file is a memo created using *Microsoft Word* and saved on the C:\ drive. The file becomes a document only after you have associated metadata with it. When you have implemented M-Files and start transferring existing files to M-Files, you add metadata to the files to make them documents.



Multi-file document:
documents can consist of multiple files. In Multi-file documents, all document files have common metadata.



The term *object* refers to instances of various object types – that is, individual objects created using object types. In M-Files there are two object types: document and company. Document object type is used for saving documents (files) into the system. Company objects are used to store customer details, such as contact information to the system.



Class is defined for all documents. With the class selection the user roughly describes the document type. In M-Files, there are nine classes to choose from.

Name or title: *

Date: *

Company: + ▾

Tag: + ▾

Description:

Documents are described in more detail with *Properties*. The properties are class-specific: agreements, for instance, can have expiry date whereas HR documents are often tagged to an employee. Required properties are marked with an asterisk (*).

2.2 M-Files User Interface

M-Files User Interface is similar to Windows Explorer. The layout may vary a bit depending on the Windows version.

Navigation pane can be used to navigate in views. Hide or show navigation pane with *Organize* → *Layout* → *Navigation pane* feature (Folders feature in Windows XP).

Task area shows the shortcut buttons to the frequently needed features.

Properties pane shows the metadata of the selected document or other object.

Preview can be used to view and copy the file contents without opening the file. Hide or show preview with *View* → *Show viewer* feature.

Search bar has the features to quickly search for the documents and other objects in M-Files.

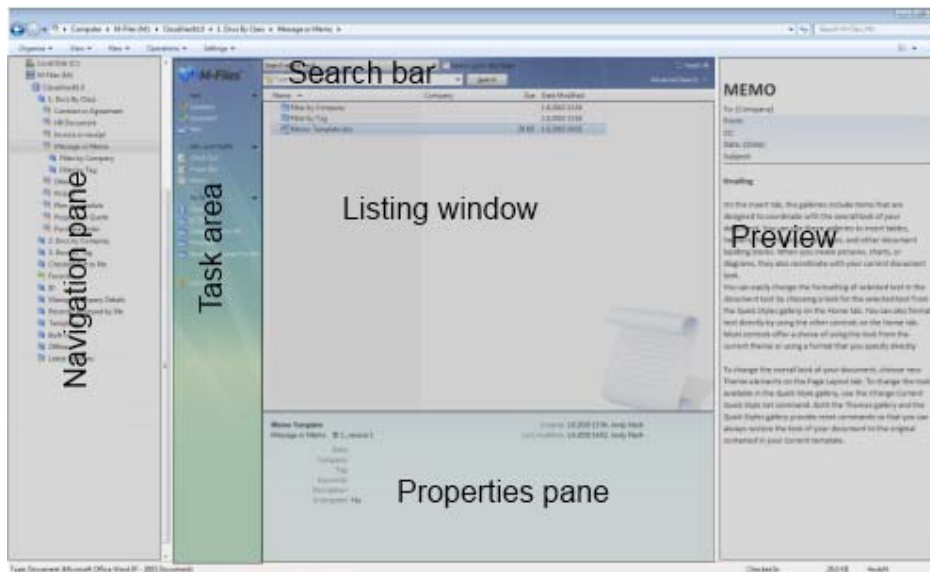


Figure 3 - Elements in M-Files User Interface

3. Saving documents

M-Files supports all file types and you can save documents from any application to M-Files. Unlike, in Windows Explorer, documents do not have fixed location within the system. All the documents are saved into the document vault and described with metadata. Users do not save documents in M-Files to any folder. The documents are found with the search features or views.

3.1 Saving documents from applications

Some applications, such as MS Word, Excel and PowerPoint have Save to M-Files feature in the file menu.

Save document by choosing *Save to M-Files* feature. The document is stored into M-Files and the metadata card is shown to the user. See chapter 3.2 for metadata tagging.

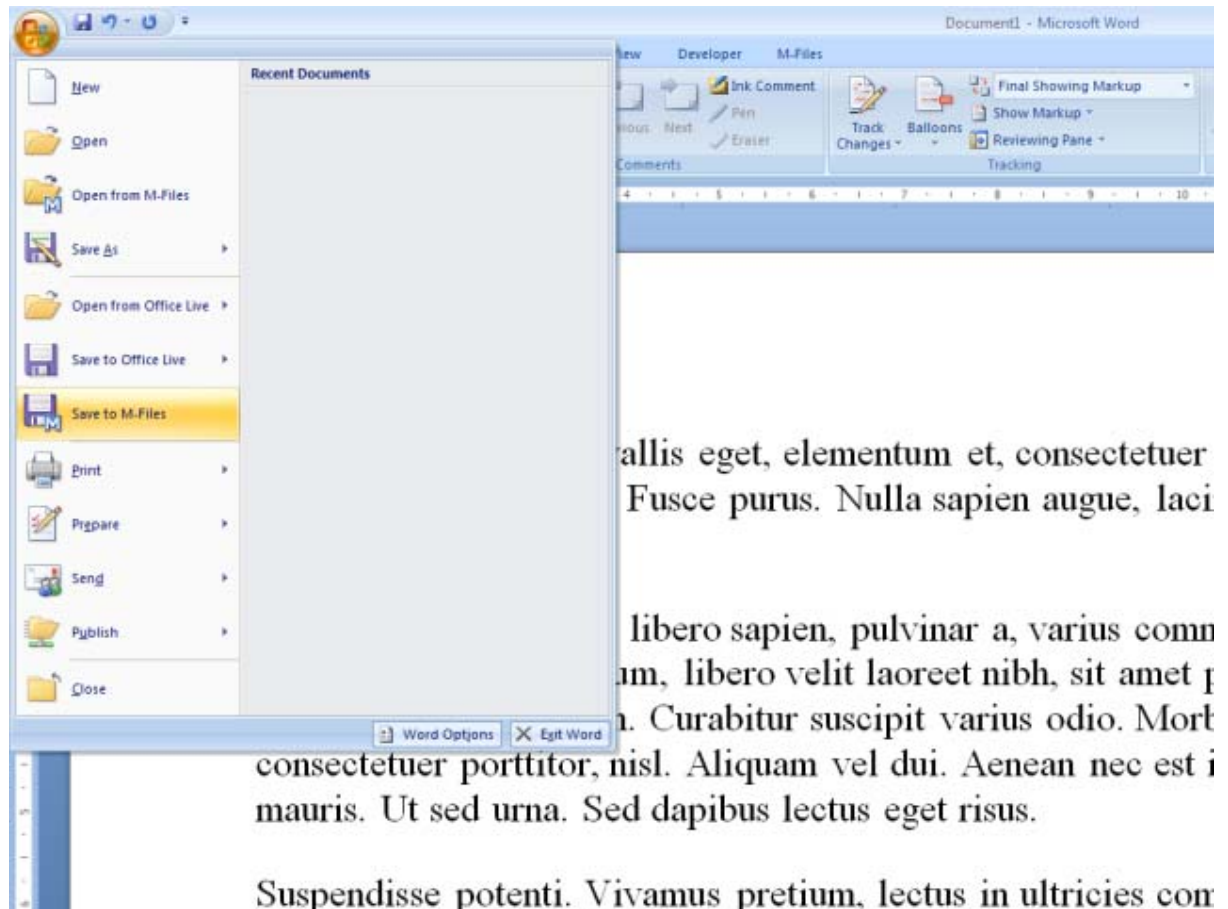


Figure 4 - Save to M-Files feature

Any application capable to save files in C drive works with M-Files too. If the application does not have *Save to M-Files* feature, choose *Save As...* feature from the File menu and save the file as a new document to the document vault (E.g. M:\Company X\). Users do not need to save the file into any view in M-Files; just press the Save button and M-Files will pop up the document card for fill in. See chapter 3.2 for metadata tagging.

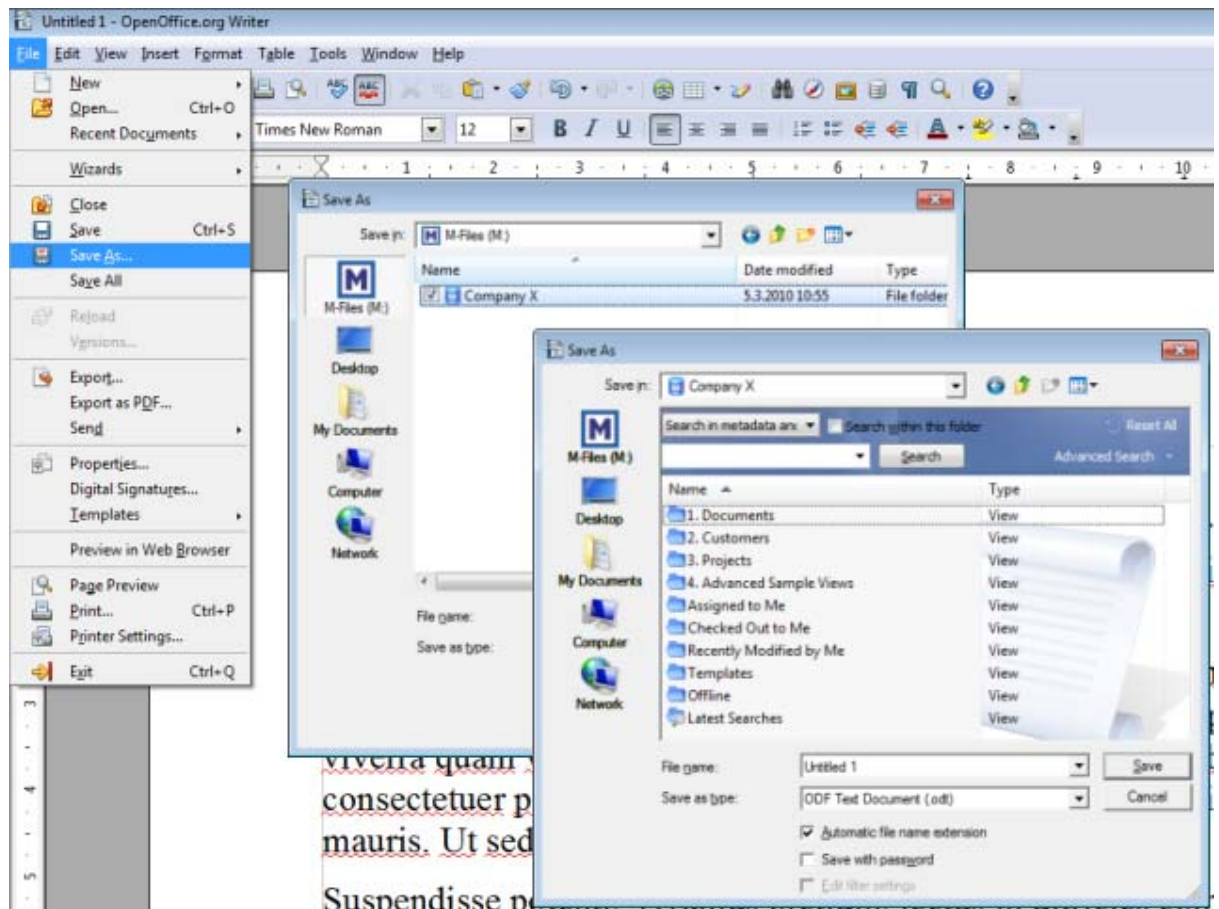


Figure 5 - Documents can be saved also into the document vault (e.g. M:\Company X\)

3.2 Saving existing files as new documents

As the applications see M-Files as hard disk in Windows, you can also use the common file operations in Windows, such as copy & paste, drag & drop etc. This makes it easy to save documents to M-Files from the network drive or memory sticks.

Copy the existing file to M-Files as a new document by right-clicking the file and choosing Add to M-Files. M-Files copies the file and pops up the metadata card. See chapter 3.2 for metadata tagging.

3.3 Using M-Files Templates

M-Files comes with four template documents. You can add new templates to the system and edit the existing ones.

To create a new document using a template, choose New document from task area (Shortcut Ctrl + N). Then, fill in the metadata card and press OK. M-Files creates a new document from the selected template and pre-fills parts of the document with metadata.

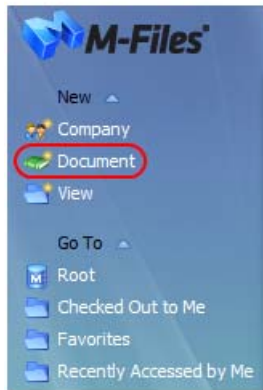
The image shows the 'New Document' dialog box in the M-Files application. The 'General' tab is selected. The 'Class' dropdown is set to 'Message or Memo'. The 'Use template' radio button is selected, and the 'Memo Template.doc' dropdown is highlighted with a red circle. The 'Create an empty multi-file document' and 'Create an empty single-file document' radio buttons are unselected. The 'File extension' field is empty. The 'Properties' section includes: 'Name or title' (Meeting Memo - A&A Consulting), 'Date' (2. 6.2010), 'Company' (A&A Consulting), 'Tag' (Sales), 'Keywords' (empty), and 'Description' (empty). The 'Permissions' dropdown is set to 'Full control for all users'. The 'Workflow' dropdown is empty. The 'Open for editing' checkbox is checked, and the 'Check in immediately' checkbox is unchecked. The 'OK', 'Cancel', and 'Apply' buttons are at the bottom.

Figure 6 - Create document using a template

ID: 5 Version: 1

Last modified: 2.6.2010 Bill Richards

MEMO

To: A&A Consulting

From:

CC:

Date: 2.6.2010

Subject:

Heading

Figure 7 - Metadata can be auto-filled to documents

3.3.1 Creating a new template

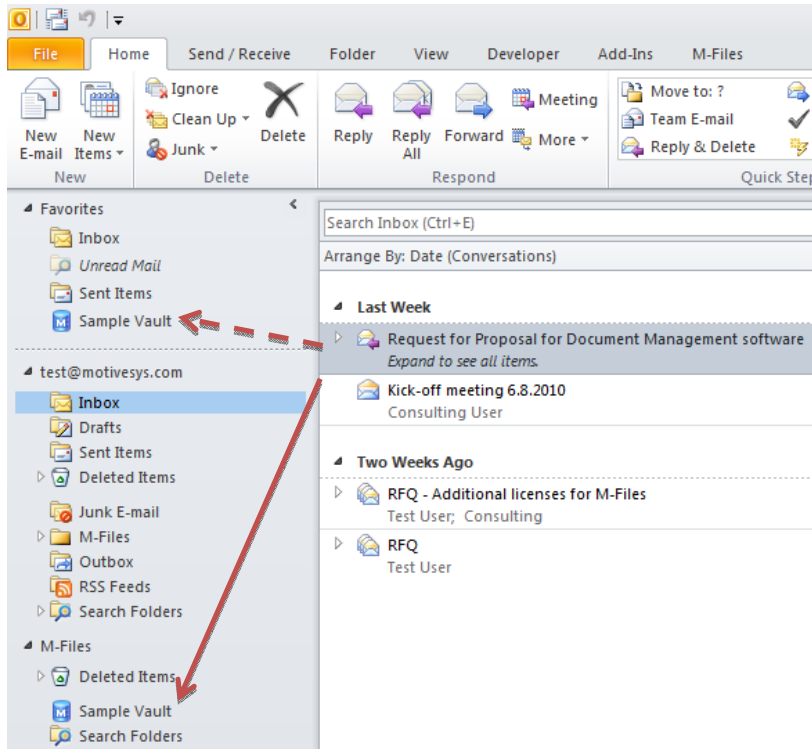
You can convert any existing file in M-Files to a template:

1. Select the document properties
2. Press More properties button
3. Add *Is template* property
4. Set *Is template* property value to Yes.

Modify M-Files template by right-clicking the document and choosing *Open*. You can add auto-filled fields to the templates with *Insert Property* feature found in M-Files ribbon. This feature is supported in MS Word, Excel and PowerPoint XP and later.

3.4 Saving E-mails from Outlook to M-Files

M-Files creates a folder in Outlook for every document vault. You can save emails with or without attachment files simply by dragging mails into the vault folder. The message is automatically tagged to a correct company in M-Files based on the domain of the sender's email address. If, for example, there is a company *Motive Systems Inc.* saved into M-Files and the e-mail address of the company is set to pr@motivesys.com, all emails from motivesys.com domain are tagged to this company automatically.



Drag E-mails into M-Files Vault folders

3.5 Metadata tagging

All documents in M-Files are tagged with metadata. The metadata tagging makes it easier to find the documents from the system. Regardless of the way to save documents to M-Files, the metadata card always pops up.

The first metadata to define is the document class, which roughly defines the type of the document.

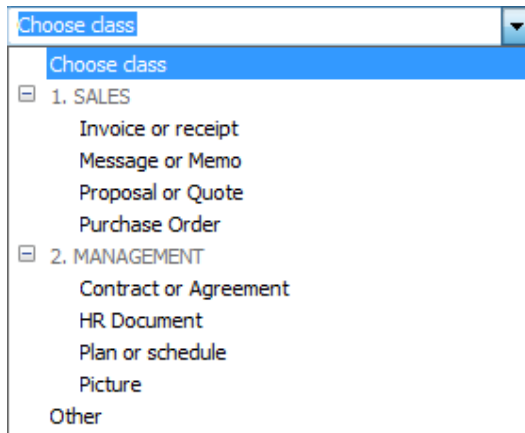


Figure 8 - Class selection

The properties to be filled depend on the selected class. Fill in the details carefully in order to find the document from the system easily.

Property	Data type	Example
----------	-----------	---------

Name or title	Text	File name
Company	Multi-select list	Associated company of the document.
Description	Multi-line text	
Employee	Text	Employee the document relates to.
Date	Date	Document date. The value is set automatically to file creation date if the value is left empty.
Effective through	Date	The expiry date of the document
Tag	Multi-select list	See chapter 3.5.1

3.5.1 Using the Tag property

Using the Tag property helps to classify documents in more detail. Typical tag names could be:

- Departments or units of the company, such as: Administration, HR or Sales
- Event names
- Project names
- System names

You can add new tags on fly when saving a new document to M-Files: start typing the tag name and the option *Add Value '<tag name>'* appears on the drop-down menu.

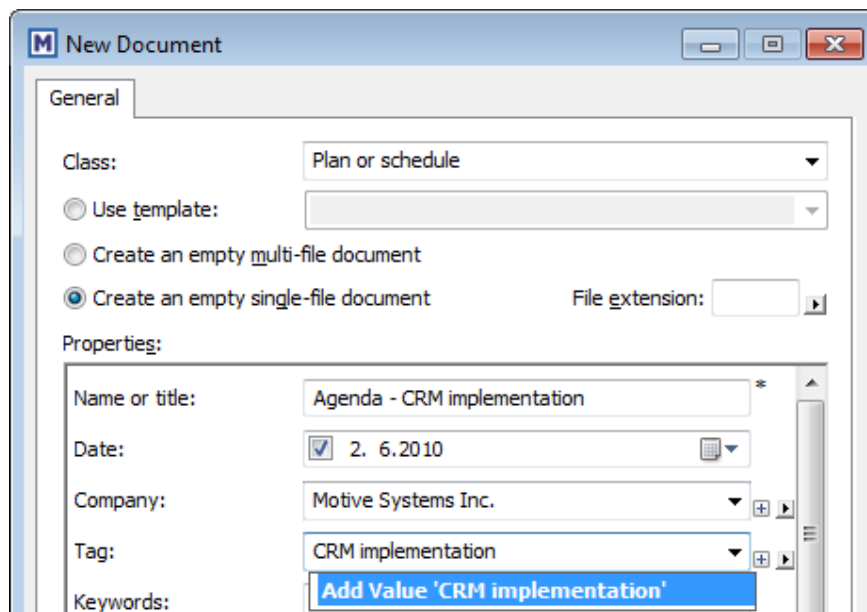


Figure 9 - Adding new tags on metadata card

Documents can have multiple tags. Add a new tag to the list with  button:

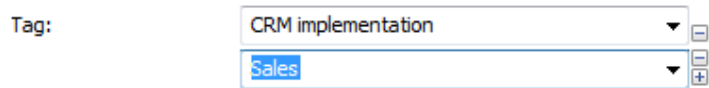


Figure 10 - Documents can have multiple tags

Tags can be used as a filter in views. You can, for example, filter to view only those Plans or schedules that have been tagged to Sales.

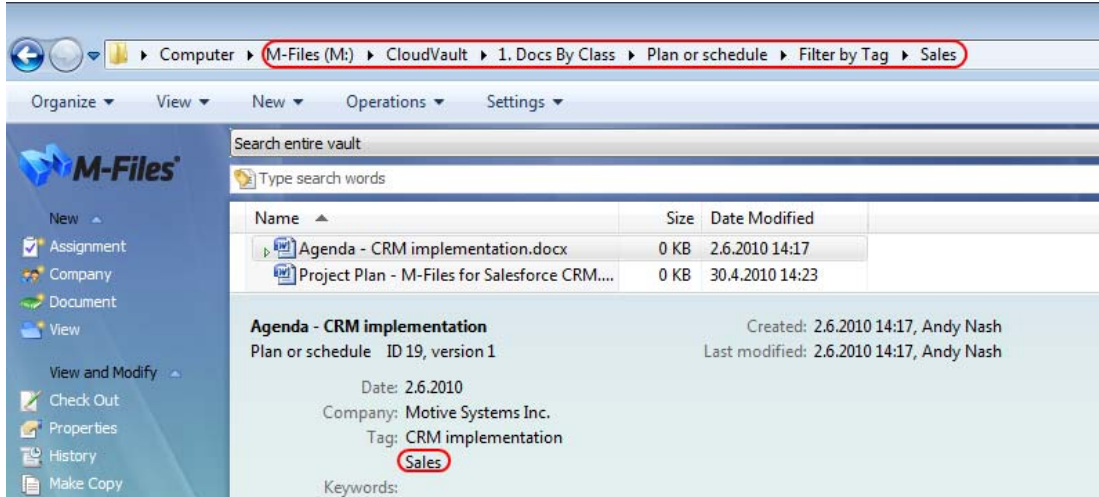


Figure 11 - Tags can be used as a filter in views

Tags are also good keywords in search:

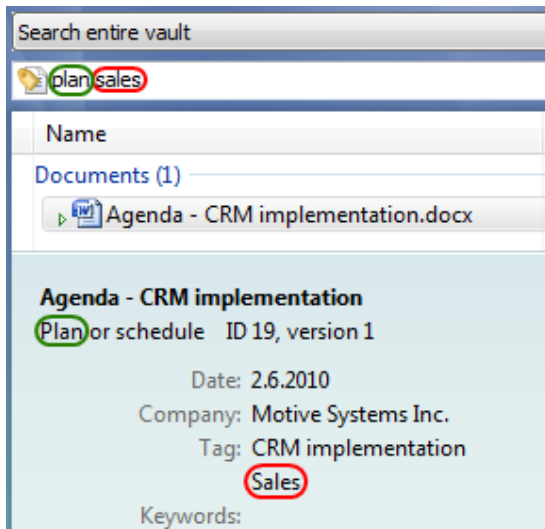


Figure 12 - Use tag name in search phrase

4. Search features

Documents in M-Files are found using the search features or views.

4.1 Views

View is a folder-like way to group documents in M-Files. The view contents are always based on the document metadata. The view consists of two components:

- Filter defines the criteria documents must fulfill in order to be shown in the view
- Grouping levels define the basis to group the filtered documents within the view

In Docs By Class view, the filter is Object type = Document. Hence, all the documents will be listed in this view regardless of the document class or any other property value. The filtered results (i.e. documents) are grouped by the document class. Hence, M-Files automatically creates a new virtual folder for each document class and groups the documents into correct folders.

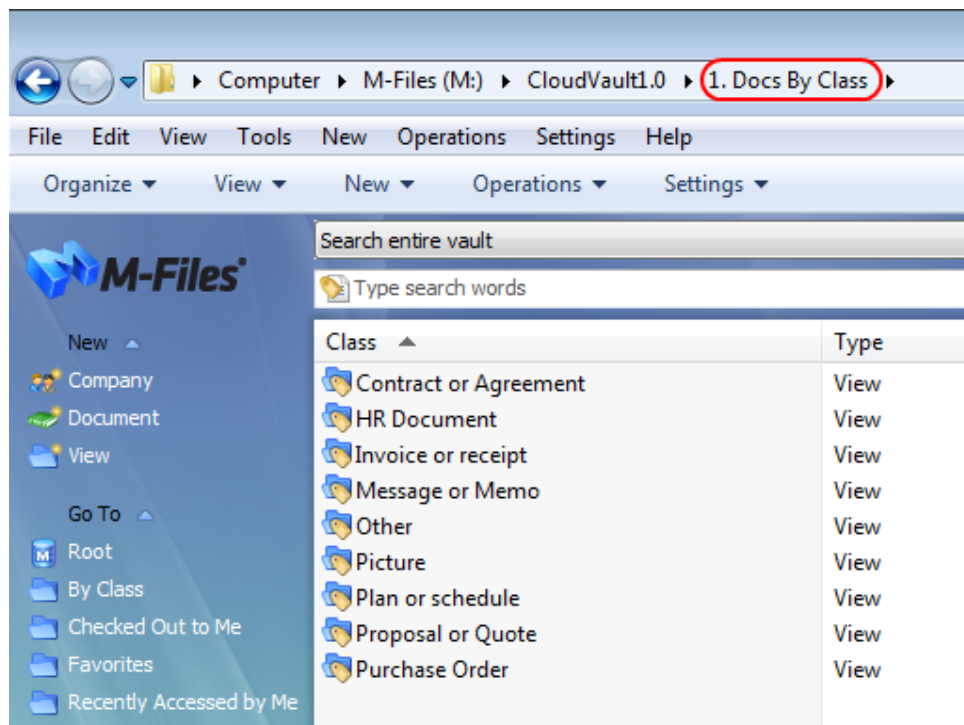


Figure 13 - Docs By Class view

4.2 Search features

M-Files Search is a quick and easy way to find documents from M-Files. **HINT:** use multiple keywords in your search in order to limit the search results: instead of searching with a word *Invoice*, try *Invoice Company X* instead.

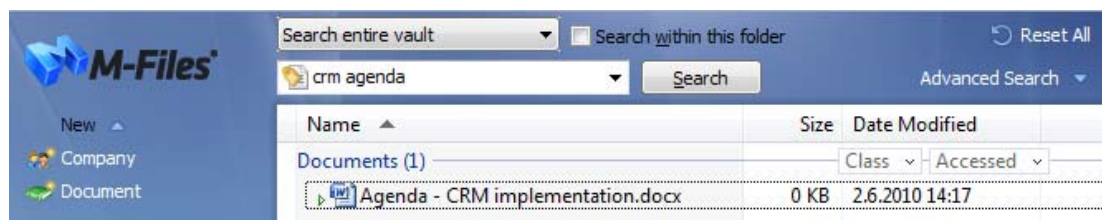


Figure 14 - Use multiple search words in order to limit the results

You can refine the search if too many results are found:

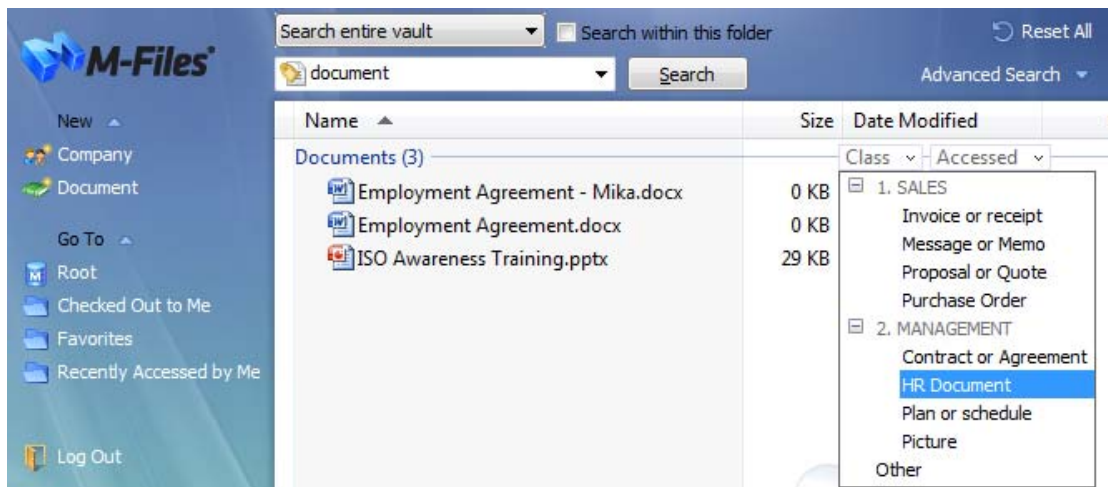


Figure 15 - Refine the search if too many results are found

5. Modifying documents

Modifying documents and other objects is controlled with Check Out/Check In feature: the document must be checked out to the user before it can be modified.

The check out is prompted when double-clicking the file in M-Files:

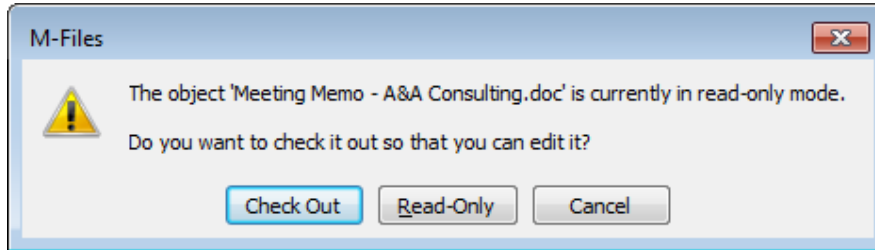


Figure 16 - Check Out reminder

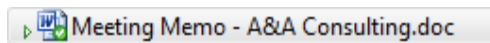


Figure 17 - Documents checked out to the current user are highlighted with a green overlay icon

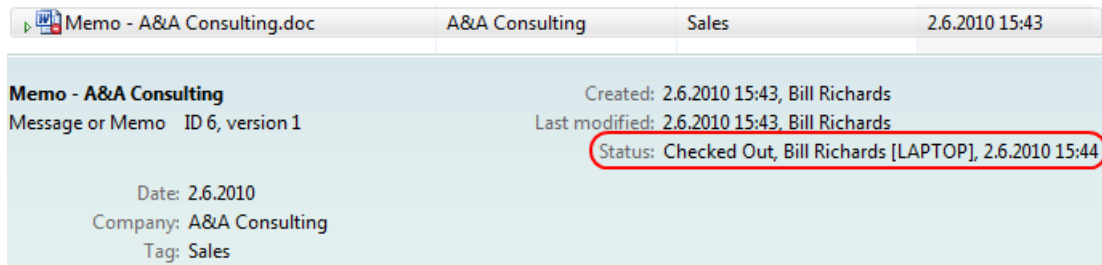


Figure 18 - Documents checked out to other user are highlighted with a red overlay icon

When closing the application, check-in reminder pops up. The modifications are saved to M-Files Server only after check-in.

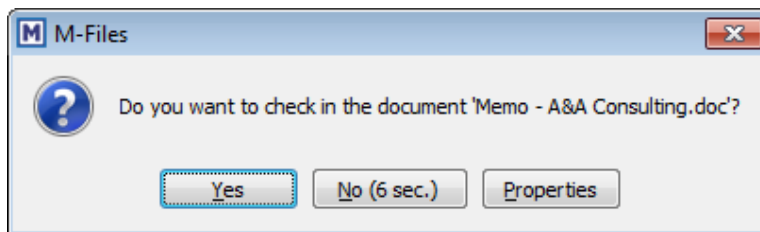


Figure 19 - Check-in reminder

The modifications made between the check out and checks in operations are saved as a new version to M-Files. M-Files shows by default only the latest version of the document and users can access the previous versions with History feature.

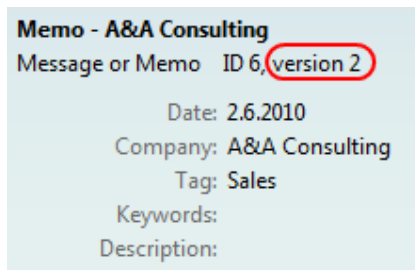


Figure 20 - Modifications are saved as new version

6. Company registry

M-Files comes with a built-in company registry allowing users to store details of their business associates. These details can be pre-filled in document templates.

Create new company from the new menu in the task area:

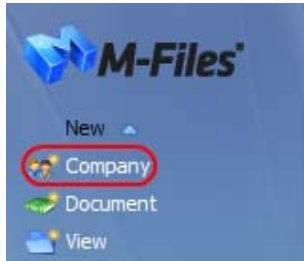


Figure 21 - Create new company

You can modify the details of the existing companies in *Manage Company Details* view.

7. Offline features

You can access and modify M-Files documents offline too. For efficient synchronization, users can select the documents they wish to be available in offline mode.

7.1 Explicitly setting document available in Offline mode

To mark one document explicitly available in offline mode, select the document and choose feature *Mark for Offline Availability in Operations* → *Offline Availability* menu

7.2 Offline filters

With offline filters, you can mark documents available in offline mode with criteria. You can, for example, choose to have all those documents you have read or modified within the last 30 days available in offline mode or all documents related to Customer X. This is a dynamic way to define the offline rules: M-Files checks periodically, whether there are new documents fulfilling the criteria and synchronizes those to offline mode too !

Offline filters are easy to create by right-clicking any view in M-Files and choosing the feature *Mark for Offline availability*.

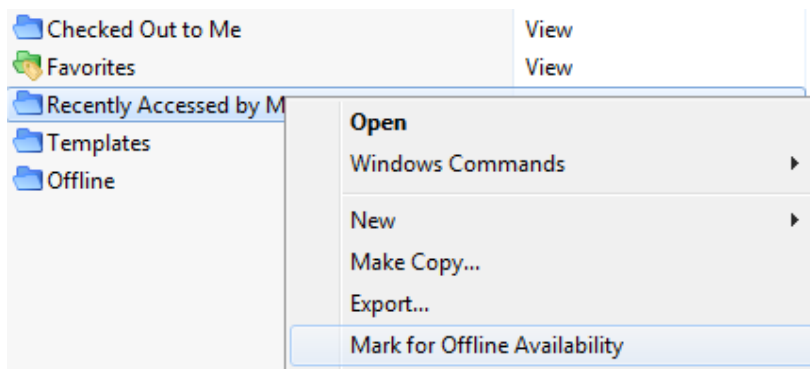


Figure 22 - Creating a new offline filter from a view

7.3 Working in Offline mode

Creating new documents and modifying the documents that are available offline is possible. When the user returns to network, files are synchronized automatically.

You can view the documents to be synchronized in offline mode in Offline view.

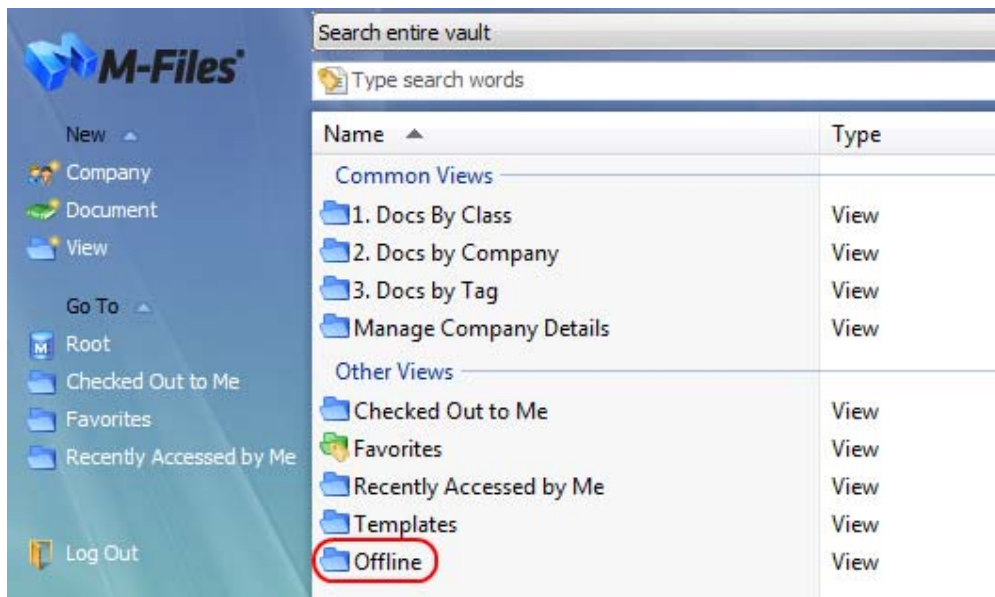


Figure 23 - Offline view

Switch to offline mode to synchronize the documents. Do not unplug the network cable.

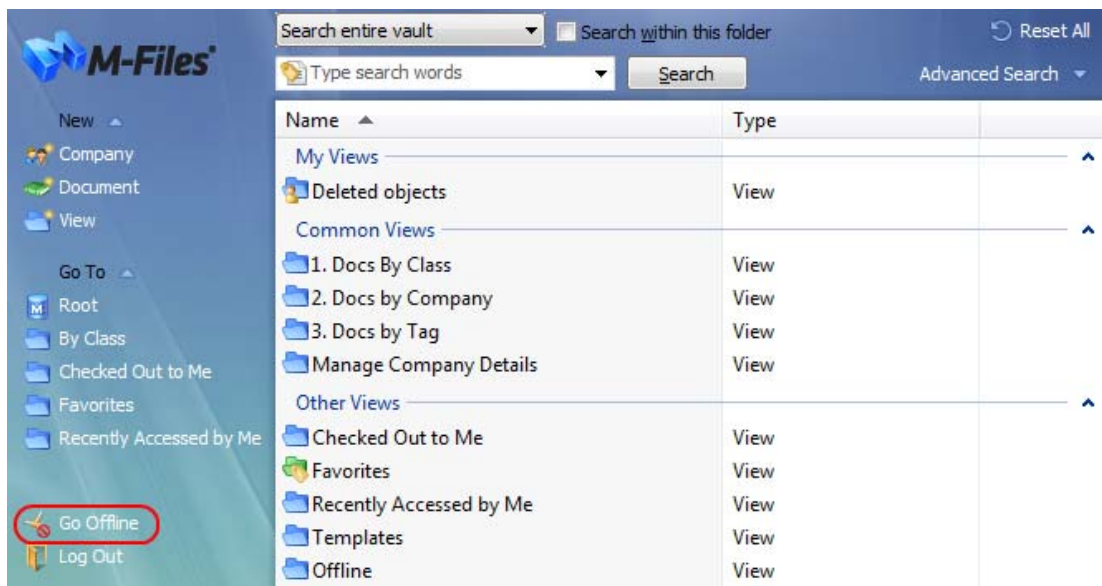


Figure 24 - Go Offline button on task area

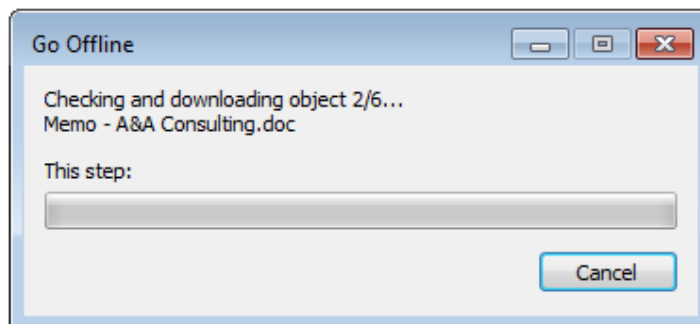


Figure 25 - Documents are synchronized to Offline mode

In Offline mode, only Offline view is shown in document vault root. User can access documents through this view.

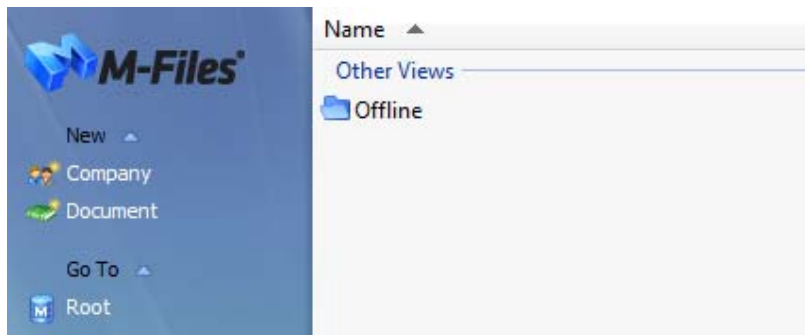


Figure 26 - Only Offline view is visible in Offline mode

Return online with Go Online feature found on task area. Documents that have been created or edited remain checked out to the user. Checked out documents can be easily checked in through Checked Out to Me view.